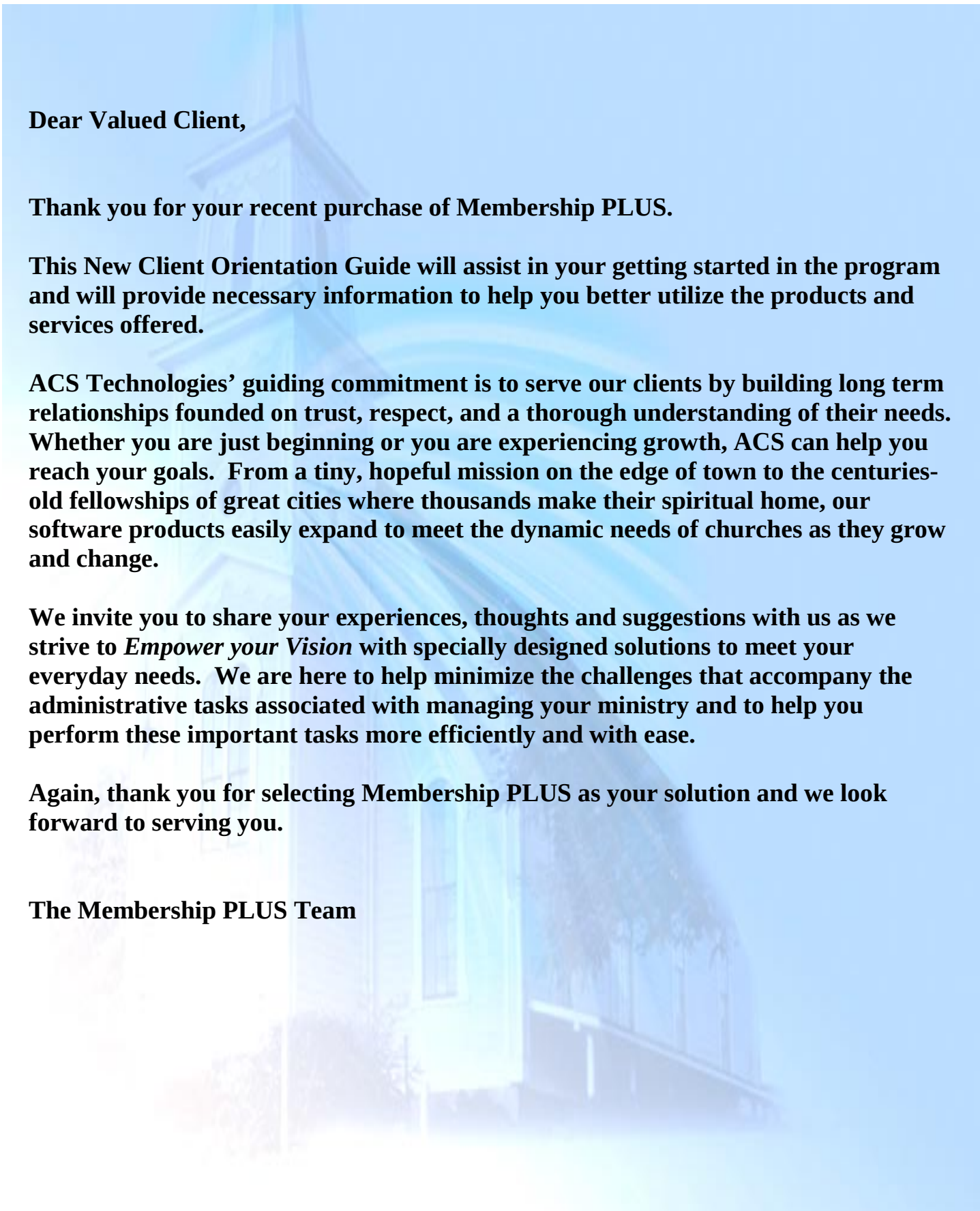


New Client Orientation (NCO)





Dear Valued Client,

Thank you for your recent purchase of Membership PLUS.

This New Client Orientation Guide will assist in your getting started in the program and will provide necessary information to help you better utilize the products and services offered.

ACS Technologies' guiding commitment is to serve our clients by building long term relationships founded on trust, respect, and a thorough understanding of their needs. Whether you are just beginning or you are experiencing growth, ACS can help you reach your goals. From a tiny, hopeful mission on the edge of town to the centuries-old fellowships of great cities where thousands make their spiritual home, our software products easily expand to meet the dynamic needs of churches as they grow and change.

We invite you to share your experiences, thoughts and suggestions with us as we strive to *Empower your Vision* with specially designed solutions to meet your everyday needs. We are here to help minimize the challenges that accompany the administrative tasks associated with managing your ministry and to help you perform these important tasks more efficiently and with ease.

Again, thank you for selecting Membership PLUS as your solution and we look forward to serving you.

The Membership PLUS Team

Getting Started In Membership Plus

Checklist ✓

Before You Begin:

- ✓ Register your software
- ✓ Review Online Resources
- ✓ View Getting Started Tutorial
- ✓ Create New Dataset/Convert Data

Configuration:

- ✓ Set Program Properties
- ✓ Establish and set Data Set Properties
- ✓ Add Users/Set Access Rights
- ✓ Make Backup

Members Module:

- ✓ Enter Families
- ✓ Enter Individuals
- ✓ Link Individuals to Families
- ✓ Enter Organizations

Financial Module

- ✓ Create/Add Banks & Link to Accounting Asset Accounts
- ✓ Create/Add Giving Funds & Link to Accounting Income Accounts
- ✓ *Enter Pledges

*Accounting Module

- ✓ Create Chart of Accounts
- ✓ Enter beginning balances
- ✓ Link Asset Accounts to Contribution Banks
(If not linked during Financial Modules setup)
- ✓ Link Income Accounts to Contribution Funds
(If not linked during Financial Modules setup)
- ✓ Associate Fund Balance Accounts to all Income, Expense, & Liability Accounts

* *Optional depending on purchased product & usage.*

For more How-To Answers, visit the [Knowledge Base](#).

Online Resources

The best solution to your most complicated problem.



Useful Tools – Services

“Transform your library by using the [Knowledge Base](#) for your organization’s internal set of Best practices, past issues, and problem resolutions.”

Knowledge Base Find the answers you need in our online self-help Knowledge Base. The natural language search can save you time and provide you with quick, accurate information 24 hours a day. Our Membership PLUS Knowledge Base is a rapidly growing database of answers to your toughest questions.

Training Membership PLUS provides training at your fingertips, set around your schedule, based on your needs. With Membership PLUS training, you can access tutorials, sign up for one on one classes that are administered over the Internet* and viewable on your own schedule and in the comfort of your office or home or attend an On Line Class.

Training Videos For visual learners, we offer short, single topic training videos for viewing on line. Watch at your convenience anytime, any day and as many times as needed.

Client Portal

Program Update Revisions & Downloads

At various times throughout the year, find recently released revisions to Membership PLUS

Enhancement Requests

An enhancement request may be submitted for product enhancements, suggestions, and/or features that you want to see added to the Membership PLUS program. Submissions will be reviewed and decisions are based upon feasibility and user demand.

Email Support

Email Support is currently provided as a free service to registered customers. Support via email is available during standard operating hours

Useful Tools cont...

Register Your Software Support is available to registered customers ONLY. Registering your product enables us to notify you of important program revisions and updates, communicates new information and ensures ownership of the program.

Membership PLUS Yahoo User Groups

Membership PLUS Yahoo User Groups are comprised of individuals who use our software and want to stay informed on tips, tricks, hot topics and various information via the Internet. Your Membership PLUS User Group gives you instant access to:

- Shared message archives
- Photos and photo albums
- Membership Plus & Group event calendars
- Member polls and shared links

And best of all, *it's free.* ..

User Groups are often a mixture of people seeking ways to improve and enhance their personal and professional expertise who swap ideas, techniques, questions, and experiences.

User Groups can also be a great resource for learning how to use Membership PLUS products to their fullest potential and for building professional church management skills. New users find User Group meetings invaluable for learning tips and shortcuts from seasoned users.

Contact Us Information on how and when to contact the Membership PLUS team.

WWW.MEMPLUSHOME.COM

Training

Membership Plus delivers training in a variety of formats. Our Online Training Library allows you access to documents, videos, & tutorials that will guide you through your software. Our goal is to provide an on-going training service to our valued clients so that you can get the best utilization of the Membership Plus Software.



Online Classroom Training

On Line Classroom Training offers live and/or pre-recorded classes presented in a solutions based format designed to improve knowledge, skills and techniques for working with membership PLUS.

We also offer staff training sessions customized just for you and your organization! Provide quality training for multiple staff/volunteer members without the cost associated with travel, meals and accommodations.

For training schedules, visit the website at
www.memplushome.com/traininghome

Tutorials & Videos

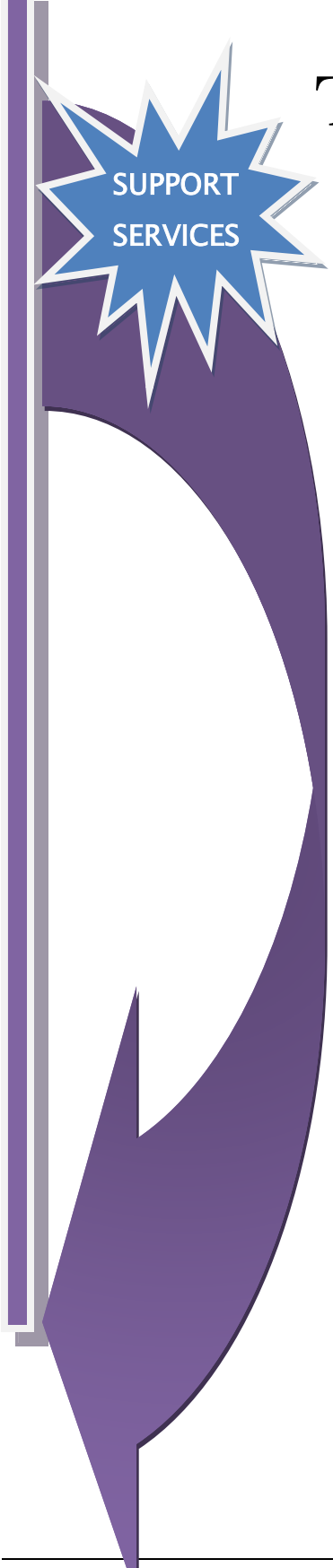
This section contains tutorial videos that you can watch and follow along with at your leisure. This method of teaching allows you to pause, rewind, and replay key elements of the process and make learning these procedures simple.

Phone Training/Consultation

When you need small doses of training in specific areas, Phone Training can be a cost-effective tool. An hour or two of Phone Training/Consultation allows you to receive the answers to your questions, and then have the time to practice what you've learned. With Membership Plus Phone Training, you continue to receive training on your time schedule, at your pace.

We have trainers available for all levels of training.

**Phone Training/Consultation is priced at \$50.00 per hour, Monday thru Thursday;
6:00 PM to 8:00 PM EST (1 hour min.)**



SUPPORT SERVICES

Technical Support

From initial installation and setup through implementation and training, our Technical Agents are here to assist you.

Support Programs offered:

Support PLUS Program¹

\$34.95 per month (12 month commitment)
\$239.95—6 months

\$149.95—3 months
\$399.95—12 months

- Priority Response
- Quick issue resolution by experienced, courteous professionals using individualized case history tracking
- Unlimited toll-free telephone support: open from 10 a.m. until 7 p.m. Monday - Thursday, and from 10 a.m. until 6 p.m. on Fridays Eastern Time.
- 24/7 access to online Knowledge Base, Training Videos and documentation.
- Support via email is available during standard operating hours
- Remote assistance service, using a Web-based desktop streaming application to communicate between your computer and Membership PLUS representatives
- FREE program revisions via online downloads
- Notification of new product updates as they become available

Pay-per-call Support²

\$30.00 per call

- Quick issue resolution by experienced, courteous professionals using individualized case history tracking
- Local Support phone number to call support (843) 413-8334: open from 10 a.m. until 7 p.m. Monday - Thursday, and from 10 a.m. until 6 p.m. on Fridays Eastern Time.
- 24/7 access to online Knowledge Base.
- Support via email is available during standard operating hours
- Remote assistance service option per call, using a Web-based desktop streaming application to communicate between your computer and Membership Plus representatives (*additional charges may apply*)

1- Enrolled clients to the Support PLUS program are charged a monthly fee of \$34.95. A 12 month commitment is required.
2- Non-Enrolled clients are charged \$30.00 per call and contact support via the local Support phone number.

DATA SERVICES



Our clients frequently ask us for assistance with their data after they have experienced some sort of change or event. In fact, unlike most software providers in our industry, we have well-trained experts who continually help our clients solve matters regarding their unique data management needs. Data Services, like its name suggests, helps clients address specific issues related to their actual data and database files, whereas Support exists to help our clients with questions about using our software. To determine if our Data Services can help you, please reference the information below.

Upgrade Conversions

If you recently purchased a Membership PLUS Upgrade and are currently using an older version of Membership PLUS, Data Services may be able to help by performing an upgrade conversion of your data.

Data Repair

Power outages, network failures, improper shutdowns, etc. can cause corruption or even data loss. Data Services can help remedy these unfortunate situations by repairing your data files.

Third Party Conversions

If you have been using QuickBooks, Money Counts, or Quicken for your Accounting package or any other third party software and what to import that data into your current Membership Plus. Data Services can help.

Data Correction

Sometimes, as users we make mistakes that we want to delete completely from the database. Data Services can Help.

All conversions and corrections are done “In-house”. Please make a backup file from the dataset (s) needing service and submit to Membership Plus. There will be a 7 -10 business day turnaround time from the date data is received. If RUSH services are requested, an additional \$25.00 will be charged (3 business days).

CUSTOM REPORTS

Get New professionally designed reports, customized to your specific needs.

Membership Plus users have the option to customize reports, create new reports, and edit existing reports using the Report Generator module.

Some clients find that it is more convenient and faster for our Team to design such reports for them. This fee is **\$50 per hour** for design & development of the new report.

If you are currently a Membership Plus customer and would like more information on how to use the Report Builder, please refer to the Knowledge Base section of the web site at www.memplushome.com/support or contact Technical Support at 843-413-8334 for detailed information and criteria for getting a custom report created by Membership Plus.

Records from 01.01.07 to 01.31.07

First Church of New User
180 N Dunbarton Road
Florence, SC 29501

	Actual	Budget	\$ Change	% of Budget
Income				
400002- Building Fund Income	16,581.00	0.00	16,581.00	0.00%
400005- Contributions-Corporations	0.00	0.00	0.00	0.00%
400001- General Offerings	1,085,281.70	0.00	1,085,281.70	0.00%
400006- Grants-Government	0.00	0.00	0.00	0.00%
400003- Interest Income	0.00	0.00	0.00	0.00%
400004- Missions Income	1,011,245.00	0.00	1,011,245.00	0.00%
Total Income	\$2,113,107.70	\$0.00	\$2,113,107.70	0.00%

	Actual	Budget	\$ Change	% of Budget
Expense				
500017- Bank Fees/Service Charges	0.00	0.00	0.00	0.00%
500010- Benevolence/Outreach Expense	0.00	0.00	0.00	0.00%
500018- Books/Publications	0.00	0.00	0.00	0.00%
500008- Building & Grounds Equipment	0.00	0.00	0.00	0.00%
500009- Community Development Expense	0.00	0.00	0.00	0.00%

Membership PLUS Terminology

MEMBERS MODULE

Member – A member is a person or an entity belonging to a church or organization. There are three membership categories.

- Families
- Individuals
- Organizations

Family – A family is a group of individuals who share a common element, such as address.

- A family can be composed of related individuals, such as a father, mother and children.
- A family can also be any group of individuals who share a common address.
- An individual can be associated with only one family.
- A family is a separate entity from the individuals who make up that family.
- Information unique to that family can be compiled into a family record and shared to individuals.
- You can add, save, edit or delete a family record. *(Family records associated with a financial record cannot be deleted)*

Individual – An individual is one person.

- Each individual is a separate entity.
- Information unique to an individual can be compiled into an individual record.
- You can add, save, edit or delete an individual record. *(Individual records associated to a financial record cannot be deleted)*
- Individuals can be designated as Guardians or Dependents.
- Individuals should be linked to a Family
- Individuals should be assigned a Family Role

Guardian – “Guardian” is a classification that designates an individual’s household status.

- “Guardian” status is the default Individual record type.
- A guardian is an individual who functions as a non-dependent.
- Children are generally designated as dependents.
- Any individual record can be designated as a dependent.
- Multiple records can be designated as dependent.
- The “Guardian” status is used as a report filter.

Dependent – “Dependent” is a classification that designates an individual’s household status.

- “Dependent” status is not selected by the user. It is automatically assigned to any individual who is not designated as a “Guardian”.
- Children are generally designated as dependents.
- Any individual record can be designated as a dependent.
- The “Dependent” status is used as a report filter.

Membership PLUS Terminology *continued*

Organization – An organization is a “non-person” entity.

- A church, a charity, or a service-based agency can be an organization.
- A business can be an organization.
- An organization is a separate entity.
- Information unique to an organization can be compiled into an organization record.
- You can add, save, edit or delete an organization record. (*Organization records associated to a financial record cannot be deleted*)

Group – A group is a collection of members linked by a specific task or trait.

- Groups can be formed based on common tasks, such as classes or committees.
- Groups can be formed based on common traits, such as marital status or age.
- Groups can be formed based on common identity, such as newsletter recipients or prayer groups.
- Each member in a group can be assigned a role.
- Groups can have organizational layers, such as “super groups” that consist of “groups of groups”.

Differences between Organizations and Groups

- An organization is a type of member. A group is a collection of members.
- An organization has an address. A group does not have an address.
- An organization can make financial contributions or pledges. A group cannot make financial contributions or pledges.
- An organization does not have meetings and corresponding attendance records. A group does have meetings and corresponding attendance records.

Membership PLUS Terminology *continued*

FINANCIALS MODULE

Contribution – A contribution is a one-time gift of money.

- Contributions may be designated for general operating purposes.
- Contributions may be designated for specified purposes.
- Contributions are tracked by their designation to Funds.

Deposits – A deposit is a collection of contributions that corresponds to the real-life bank deposits.

- Deposits entered in the Financial Module impact the balances of selected checking and income accounts in Accounting.
- Deposits cannot properly be recorded if Funds and Banks are not correctly set up and linked.
- Deposits should be done on a regular basis.
- Deposit records can be exported from Membership Plus for import into Quicken or QuickBooks from Intuit.
- Deposits are a requirement for the periodic archiving of financial transactions, generally a year-end procedure.

Funds – A “fund” in the Financials Module is a tool used to measure and report the receipt of designated money.

- Funds set up in Financials should be properly linked to corresponding Income accounts in the Accounting Module.

Pledges – A pledge is a promise to give a certain amount of money over a designated period of time.

- Pledges are generally expressed as a specified dollar amount given per week or per month for a specified time period.
 - Pledges are associated with a specified fund.
-

Module – An independent piece of software which forms part of one or more larger programs.

- Membership Plus consists of a group of modules.
- The distinction between Standard and Deluxe is based on the available modules.
- Each module opens its own window.
- You can open more than one module open at the same time.

Sample Dataset – A sample dataset is provided allowing you to view the program’s features and functions.

- You can enter information into the Sample Dataset for the purpose of practice.
- Create a working dataset when you are ready to begin operational use of the program.

Looking for more ways to save time and money?

Sold separately. Additional terms, conditions, limitations and fees apply.

Thank You for your purchase

Congratulations on choosing Membership Plus software to run your organization more efficiently.

Check out all the other ways that Membership Plus can help your Organization grow.

Go Online to

www.memplushome.com to Order additional products or call Toll Free 1-(866) 539-6391.

Sending Statements

The image shows a sample of a Charitable Contribution Report form. At the top, it says "Send Inland Church, The Salvation Army, Florence, SC". Below that, it says "Mr. & Mrs. Jeff Van Lier, P.O. Box 101, Florence, AL 36508". There are buttons for "PAGE 1", "DATE 12/31/2008", "CHARITABLE CONTRIBUTIONS Tax deductible for 2008 YEAR 2008", and "QUANTITY 1". The main part of the form is a table with columns: "CONTRIBUTOR", "DATE", "AMOUNT", "DESCRIPTION", and "NET AMOUNT". The table contains 26 rows of data, each representing a contribution entry. At the bottom right, there is a "TOTAL" row showing a net amount of \$1,100.00.

Product Id: 12550

Envelopes-Double Window Available

Charitable Contribution Report

Tax Forms: The most widely used statement form! Fulfill IRS regulations by providing written acknowledgement of individual contributions of \$250 or more on a given day, or quid pro quo (something for something) gifts over \$75, and all non-cash gifts.

- 8 1/2" x 11" letter-size statements
- Meets all IRS reporting requirements
- Preprinted with required information, including the statement "Unless otherwise noted, the only goods or services provided are intangible religious benefits."
- Space to report 26 contribution entries per page
- Automatically prints and totals multiple pages as needed
- Space to accommodate three comment lines
- Attractive and easy to read, which improves communication with your members
- Fits easily into double window envelopes for ease of mailing

Check Reader



Quickly scan checks as they pass through the Check Reader. Simply enter the amount and fund, then move on to mark the next contribution.

Product ID: 12710

Phone Tree 2100



Product ID: 12760

The Phone Tree 2100 is an easy-to-use, affordable single-message calling solution, offering many advanced features with the flexibility of multiple phone lines. Operation is so simple, you can start calling within minutes of taking the unit out of the box. You just record another message for the next job, import your list and start calling.

- Multiple area codes? Long-distance or local? Metro dialing? Phone Tree's dialing translator easily handles any type of number.
- If the line is busy or no one is home, Phone Tree "remembers" to try again later, attempting busy lines sooner than those not answered, just as you would.
- By using multiple phones lines, you can reach large numbers of people in a fraction of the time otherwise required for a person to make the same number of calls.
- Make sure your calls aren't lost in the "kid zone" by having call recipients press "9" to play your message after hearing your greeting.
- Comes as a one line unit, with the option to purchase an additional line.

Additional lines and styles available



Membership PLUS Checks and Accessories

You can benefit from professional check forms. Competitive prices. Great colors. Excellent service.

First-time Check Buyers –
Get 250 Checks and Envelopes FREE!

Laser Checks

For use in Membership PLUS Deluxe v11

Want the convenience of printing single or multiple checks quickly from your laser printer? Comes perforated – you keep one stub for the office and your payee keeps one for their record-keeping.

- Attractive solid and marble background colors

Item 12055 Laser check 8 1/2" x 11"
 (stub, check, stub format)

Item 12051 Laser check 8 1/2" x 11"
 (check, stub, stub format)



Item 12055

**\$118
VALUE**

Check Envelopes

Avoid hand-addressing and save time with double window check envelopes! Look professional with check envelopes that fit all the checks we offer.

- Sized for checks printed from Membership PLUS Deluxe v11
- Color: white envelope with black security printing

Item 12563 Double window envelope for checks with latex self-sticking seal*

* The recommended shelf life for self-sticking seals is 6 months



Item 12111

Check Binders

Membership PLUS offers many products to complement your checks! Keep organized with durable check binders you can keep in your office or take with you on the road.

- Binders keep you check copies organized with two 2" rings
- Available in burgundy, green, blue, black, charcoal, and red

Item 12005 Check Binder



Item 12005